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AUTHOR	McLeod, Sadie
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ABSTRACT

Supporting performance objective 20 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on developing a records system are included in this packet. (The packet is the eighth in a set of nine on maintaining files and a library--CE 016 939-947.) The student materials include information on developing a records system, a check-out activity, and an instructor's final checklist for evaluating student performance. The instructor's manual includes instructions for duplicating the checklist. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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DEVELOPING A RECORDS SYSTEM

STUDENT'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod

from
Materials Developed and Graciously Provided by
Bureau of Vocational Education, State Department of Education
and
Department of Vocational Education
College of Education, University of Kentucky

These materials support
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Columbia, South Carolina 29201

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

DEVELOPING A RECORDS SYSTEM

INTRODUCTION

Confusion because of disorganization within an office can many times be the result of a filing system that is not set up properly, one that is not maintained because of inefficient office workers, or a lack of understanding on how a system should be set up and maintained. In this module you will be given rules for and practice in setting up a filing system that should aid you in understanding the importance of proper organization.

DIRECTIONS

Before you start to work on this module, be sure you have completed Module IV-G, "Managing Records Systems'"

If you have completed that module, read the objectives below. After you have read the objectives, perform the Learning Activities in the order given.

OBJECTIVE

Given a case situation in which it is required to set up a filing system, establish a filing system for the company that best meets the needs of the specified situation. Record your proposed plans. Performance will be evaluated on completeness and appropriateness as judged by the instructor.

LEARNING ACTIVITIES

READ	1. STUDY Instruction Sheet I, DEVELOPING A RECORDS SYSTEM.
CHECK	2. ARRANGE with your instructor to complete this module by performing the CHECK-OUT ACTIVITIES.

Instruction Sheet I

DEVELOPING A RECORDS SYSTEM

You are working for a new branch office of the Acme Trucking Company and need to set up a filing system that would best fit your needs for maintaining a good filing system for the office. As you start working through the correspondence that needs to be filed, you will observe a variety of things to be filed, so you read and sort the correspondence and develop some notes to help you decide on the "best" filing system.

Now you must start thinking of ways you will be using the files, how your boss or supervisors will need to use the files, how rapidly available and accessible the records need to be for personal contracts or telephone usage (i.e. customers or main office contracts). Now you must decide the system (alphabetic, geographic, numeric, subject, or a combination of two of these systems) to be used to set up your files. Decide on the best system from the notes you've jotted down. Then prepare a "register" for your filing system so that anyone using the files can look at a listing of all guides and folders to make sure of the best possible place for the correspondence to be filed or retrieved.

For example, if you have correspondence of . . .

a) an insurance claim filed by a visitor injured in a fall on the sidewalk in front of your building

b) a premium notice on the company's theft insurance policy

c) a detailed listing of finished goods on hand in the storeroom

d) an out-of-stock list of stored supplies in the warehouse

. . . you might prepare your "register" like the following:

1. Insurance (Guide)

   1.1 Accident
   1.2 Fire
   1.3 Theft

2. Storage (Guide)

   2.1 Storeroom
   2.2 Warehouse

By preparing such a register and placing one copy in the front of your file or a convenient place and giving anyone that frequently places or uses the files a copy, he/she could help "code" correspondence to be filed or help insure proper return of correspondence to the files.

Check-Out Activity I

Using the background given in Instruction Sheet I, set up a filing system (combining two systems into one) for the notes that you jotted down as you sorted through the correspondence needing to be filed. Type a list and present it to your boss (teacher) for approval. Indicate company name and date on your register.

Customer Shipping Invoices & Charges:

- Dave's Meat Market, Colton, OH Sept. 5, 12
- Swanson Wholesale Co, Canton, OH Sept. 1, 3, 7 Check for $155 Sept. 20
- SWP Corporation, East Peru, ME August 27, 29, 31
- Niles Construction, Niles, KS August 28, 30 Check for $1,175 Sept. 12
- Carroll's Orchards, Iberia, OH July 27, 29 Check for $735 Aug. 7
- Sternes' Nursery, Eure, NC July 30, July 15
- Check from Sternes' Nursery, July 25
- Stern Masonry Co, Bombay, NY July 31
- Serle's Fruit Farms, Oxford, MS August 5, 7, 9, 17
- Haskins & Sells, Oneco, CT July 17, 19
- FMC Corporation, Laie, HI July 27, August 15 Check of Aug. 30 $387.50

Delivery Records and Claims:

- Niles Construction Co., Niles, KS July 3
- Gulf Tourist Center, Barre, VT July 15
- Airdale Camera Shop, Moscow, TX August 29
- Valley Park Golf Course, Ozark, MI July 27, August 15
- Cape Hope Restaurant Dubuque, IA, August 12, 15
- Six Lakes Motel, Mingo, WV Sept. 3
- Peel's Photo Studio, Troy, TX August 25, Sept. 7
- Marion Lee-Morrison, Inc. Berne, NY August 12
- Airedale Camera Shop, Lexington, TN Sept. 8
- Yacht Owners Cooperative, Wibaux, MT August 17
- Amer-Strauss Co., Yolo, ME August 13, 25
- QueenAnne'sMuseum, Mason, OH July 8
- Joan's Cosmetic Studio, Reno, OH July 22
- American Steel, Frankfort, OH August 5, 17

Bills to Pay:

- Sept. Gas & Electric
- Sept. Garage Rental
- August & Sept. Water
- August Gas & Oil for Trucks
- Sept. Telephone Bills
- Newspaper Advertising for August & Sept.
- TV Advertising for Sept.
- Insurance Premiums for Fire
- Insurance Premiums for Theft
- Insurance Premiums for Accident

Receipts for Paid Bills:

- Gas/Electric
- Gas & Oil
- Garage Rent
- Water
- Advertising on TV

Check-Out Activity I, Continued

Payroll & Taxes:
- **Road Taxes**
- **State Taxes**
- **Federal Taxes**
- **FICA**
- **Payroll**

Instructor's Final Checklist

DEVELOPING A RECORDS SYSTEM

Check the student's performance in the following elements of developing a records system.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished, or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

		STUDENT PERFORMANCE			
		Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1.	Studied and identified correspondence notes	[ ]	[ ]	[ ]	[ ]
2.	Logically arranged a subject/alphabetic or geographic/alphabetic filing system	[ ]	[ ]	[ ]	[ ]
3.	Correctly and carefully evaluated work in preparing guides and folders	[ ]	[ ]	[ ]	[ ]
4.	Typed a neat register within an acceptable limit as determined by instructor	[ ]	[ ]	[ ]	[ ]

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NOTES TO TEACHER

Review this module carefully before beginning instruction.

The Instructor's Final Checklist, page 6, is a perishable item. You should duplicate enough copies for your evaluation of each student's performance.